



SpiraPlan® | Quick Start Guide
Inflectra Corporation

Date: October 6th, 2014



Contents

Introduction	1
1. Logging In and Selecting a Project	2
2. Enter the Requirements and User Stories	3
3. Create the Release Plan	6
4. Adding Requirement Tasks	7
5. Planning the Iteration	10
6. Assigning the Requirements & Tasks	12
7. Logging Issues and Defects	16
8. Reporting	20
Legal Notices	22

Introduction

SpiraPlan® is a complete agile project planning and management system designed specifically for agile methodologies such as Scrum, Kanban, and Extreme Programming.

SpiraPlan manages your project's requirements, user stories, release plans, iteration/sprint plans, tasks, bugs and issues in one environment. Since its web based, teams can collaborate in real time and have up to the minute visibility of the project's status.

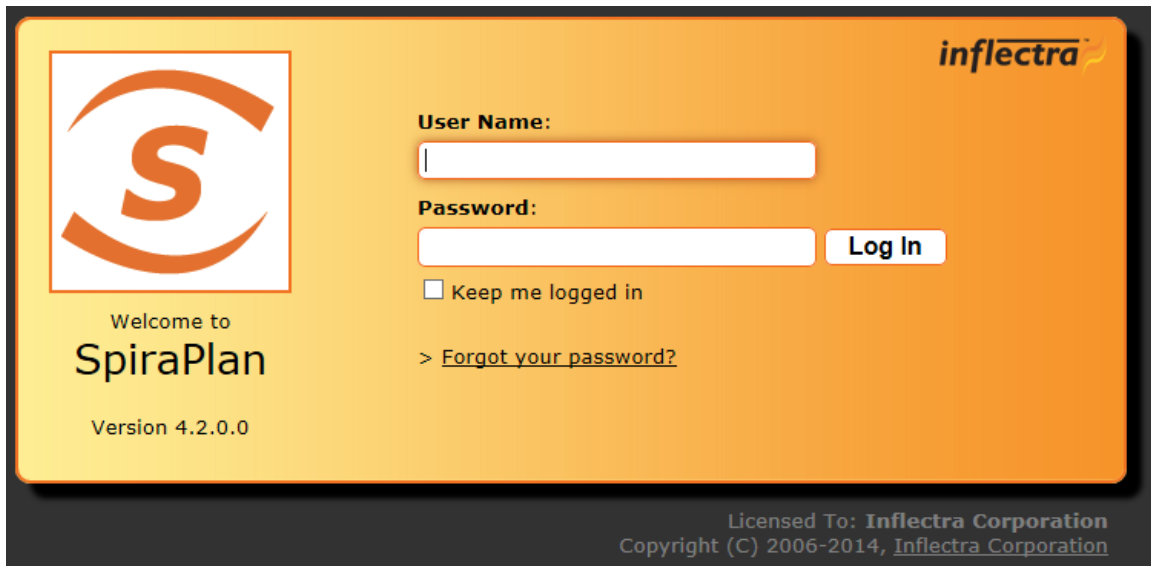
This guide provides a quick step-by-step tutorial for creating a sample SpiraPlan project, adding some user stories and associated tasks, building the release plan, assigning the backlog items to the various sprints, and then demonstrating how the developers manage their workload, update their assigned items and log bugs/issues as needed.

For further information on using SpiraPlan, please refer to the more comprehensive *SpiraPlan User Manual*.

For information on setting up a new SpiraPlan instance, creating projects and users and other administration tasks, please refer to the *SpiraPlan Administration Guide*.

1. Logging In and Selecting a Project

Once you have either downloaded and installed a trial version of SpiraPlan or signed up for a hosted trial, you should be able to see the following login screen in your web browser:

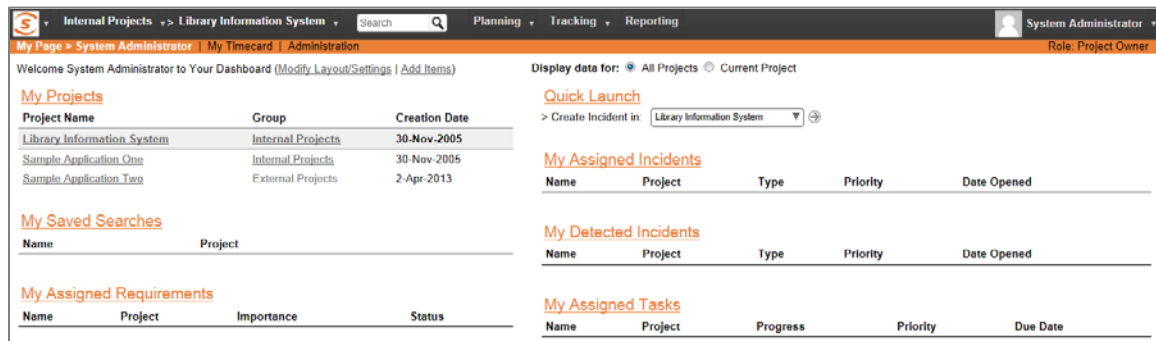


The login screen for SpiraPlan Version 4.2.0.0. It features the Inflectra logo in the top right corner. On the left, there is a large 'S' logo and the text 'Welcome to SpiraPlan Version 4.2.0.0'. On the right, there are input fields for 'User Name' and 'Password', a 'Log In' button, a checkbox for 'Keep me logged in', and a link for '> [Forgot your password?](#)'. At the bottom right, it says 'Licensed To: Inflectra Corporation Copyright (C) 2006-2014, Inflectra Corporation'.

Enter the following default login and password to start using the system:

- Login: administrator
- Password: PleaseChange

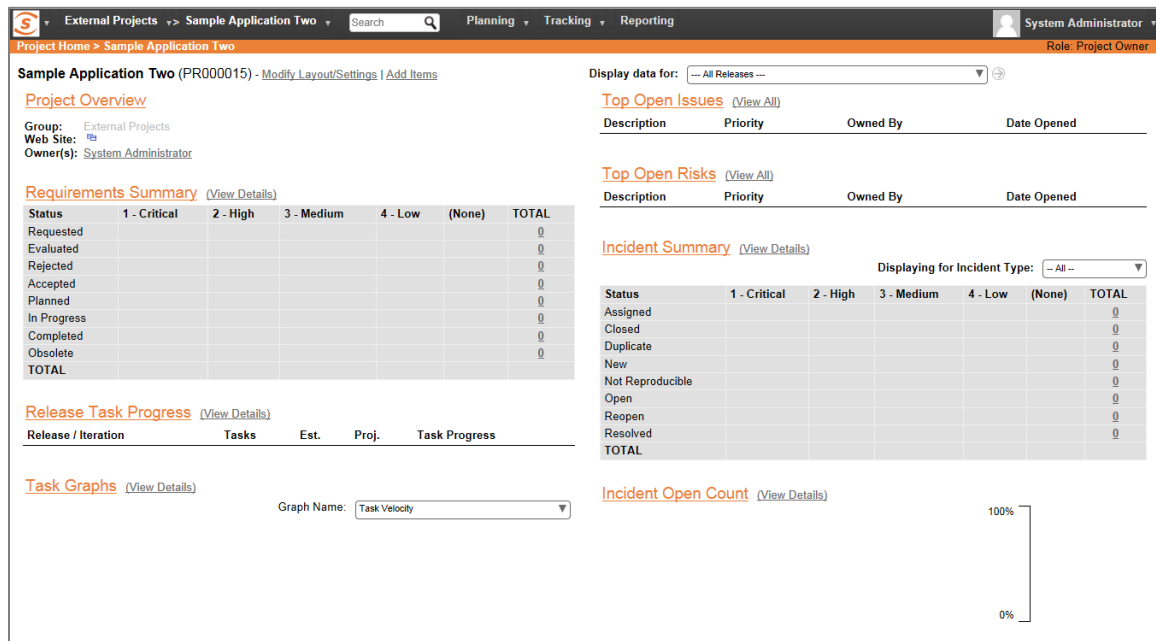
Once you have logged-in, you should be taken to the “My Page” for your user:



The 'My Page' dashboard for a System Administrator. It shows a welcome message and a list of projects under 'My Projects'. The projects are: Library Information System (Internal Projects, 30-Nov-2005), Sample Application One (Internal Projects, 30-Nov-2005), and Sample Application Two (External Projects, 2-Apr-2013). There are also sections for 'My Saved Searches', 'My Assigned Requirements', 'My Assigned Incidents', 'My Detected Incidents', and 'My Assigned Tasks'. The top navigation bar includes links for Internal Projects, Library Information System, Search, Planning, Tracking, and Reporting. The user is identified as System Administrator with the role of Project Owner.

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Two	External Projects	2-Apr-2013

Initially this page will be fairly empty, with only the list of sample projects populated. This is normal. For this tutorial we want to start out with an empty project that has no data in it, so click the hyperlink under “My Projects” for “[Sample Application Two](#)”. That will bring up the homepage for the empty project:



The project home page will display various widgets containing key project metrics; however they will be initially empty. The next step will be to start entering your project's data.

2. Enter the Requirements and User Stories

Click on the Planning > Requirements menu option to display the project's requirements list page:

Requirements | Releases | Iterations | Planning Board | Documents

Insert | Delete | Indent | Outdent | Show Level | Refresh | Edit | Tools | Show/Hide columns | Filter

Displaying 0 out of 0 requirement(s) for this project.

Quick Filter	Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID	Edit
My Filters (No filters available)		-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	RQ	Edit

Shared Filters

Show 15 rows per page

Displaying page 1 of 0

The terminology in SpiraPlan is designed to be methodology agnostic, however the following table illustrates the nomenclature used in SpiraPlan and how it relates to some common agile methodologies:

SpiraPlan	Extreme Programming	Scrum	AgileUP / DSDM
Summary Requirement	Epic	Epic	Feature Group
Requirement	User Story	Backlog Item	Requirement
Task	Task	Task	Task
Release	Release	Release	Release
Iteration	Iteration	Sprint	Iteration

Initially the requirements list will be empty. Click on the "Insert" button in the main toolbar to enter the following requirements in turn:

- Functional Requirements
- Module 1
- System must allow entry of users
- System must allow the modification of users
- System must allow the deletion of users
- Module 2
- System should allow administrators to setup notifications

You should now have a simple flat requirements list, as illustrated below:

External Projects > Sample Application Two

Requirements | Releases | Iterations | Planning Board | Documents

Displaying 7 out of 7 requirement(s) for this project.

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Functional Requirements	Not Covered	No Tasks		Requested		Feature	RQ:000037	Edit
Module 1	Not Covered	No Tasks		Requested		Feature	RQ:000038	Edit
System must allow entry of users	Not Covered	No Tasks		Requested		Feature	RQ:000039	Edit
System must allow the modification of users	Not Covered	No Tasks		Requested		Feature	RQ:000040	Edit
System must allow the deletion of users	Not Covered	No Tasks		Requested		Feature	RQ:000041	Edit
Module 2	Not Covered	No Tasks		Requested		Feature	RQ:000042	Edit
System should allow administrators to setup notific...	Not Covered	No Tasks		Requested		Feature	RQ:000043	Edit

Show 15 rows per page

Now to correctly indent the requirements, select the checkboxes of all the requirements under “Functional Requirements” and click ‘Indent’. Then select the three requirements under “Module 1” and click ‘Indent’ again. Finally right-click on the last requirement and choose ‘Indent’ from the popup context menu. You should now have a list that looks like:

External Projects > Sample Application Two

Requirements | Releases | Iterations | Planning Board | Documents

Displaying 7 out of 7 requirement(s) for this project.

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Functional Requirements	Not Covered	No Tasks		Requested		Package	RQ:000037	Edit
Module 1	Not Covered	No Tasks		Requested		Package	RQ:000038	Edit
System must allow entry of users	Not Covered	No Tasks		Requested		Feature	RQ:000039	Edit
System must allow the modification of users	Not Covered	No Tasks		Requested		Feature	RQ:000040	Edit
System must allow the deletion of users	Not Covered	No Tasks		Requested		Feature	RQ:000041	Edit
Module 2	Not Covered	No Tasks		Requested		Package	RQ:000042	Edit
System should allow administrators to setup notific...	Not Covered	No Tasks		Requested		Feature	RQ:000043	Edit

Show 15 rows per page

We finally want to set a type and priority value for the different requirements, to do that we can simply click the “select all” checkbox at the top of the list and then click on the top ‘Edit’ button in the right-hand column. That will make all the requirement rows editable:

External Projects > Sample Application Two

Requirements | Releases | Iterations | Planning Board | Documents

Displaying 7 out of 7 requirement(s) for this project.

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Functional Requirements	Not Covered	No Tasks		Requested		Package		Update Cancel
Module 1	Not Covered	No Tasks		Requested		Package		
System must allow entry of users	Not Covered	No Tasks		Requested		Feature		
System must allow the modification of users	Not Covered	No Tasks		Requested		Feature		
System must allow the deletion of users	Not Covered	No Tasks		Requested		Feature		
Module 2	Not Covered	No Tasks		Requested		Package		
System should allow administrators to setup notific...	Not Covered	No Tasks		Requested		Feature		

Show 15 rows per page

Now, set the requirement type to ‘User Story’ and choose some different values for the ‘Importance’ field and click Update. Now you will have a prioritized list of user story requirements:

External Projects > Sample Application Two

Requirements | Releases | Iterations | Planning Board | Documents

Displaying 7 out of 7 requirement(s) for this project.

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Functional Requirements	Not Covered	No Tasks		Requested		Package	RQ:000037	Edit
Module 1	Not Covered	No Tasks	1 - Critical	Requested		Package	RQ:000038	Edit
System must allow entry of users	Not Covered	No Tasks	1 - Critical	Requested		User Story	RQ:000039	Edit
System must allow the modification of users	Not Covered	No Tasks	1 - Critical	Requested		User Story	RQ:000040	Edit
System must allow the deletion of users	Not Covered	No Tasks	3 - Medium	Requested		User Story	RQ:000041	Edit
Module 2	Not Covered	No Tasks	2 - High	Requested		Package	RQ:000042	Edit
System should allow administrators to setup notific...	Not Covered	No Tasks	2 - High	Requested		User Story	RQ:000043	Edit

Show 15 rows per page

Now that we have prioritized the requirements, the developers or business analysts would be responsible for estimating the complexity of each requirement and entering that estimate for each item. To do that we first need to display the estimate column in the grid. To do that, click on the “Show/Hide Columns” dropdown list and show the Estimate column. This will display the requirements’ estimates in the grid:

External Projects > Sample Application Two > Search > Planning > Tracking > Reporting

System Administrator

Requirements | Releases | Iterations | Planning Board | Documents

Insert Delete Indent Outdent Show Level Refresh Edit Tools Show/Hide columns Filter

Displaying 7 out of 7 requirement(s) for this project.

Name	Progress	Importance	Status	Release	Type	Estimate	ID	Edit
Functional Requirements	No Tasks		In Progress		Package	4.0	RQ:000037	Edit
Module 1	No Tasks	1 - Critical	In Progress		Package	3.0	RQ:000038	Edit
System must allow entry of users	No Tasks	1 - Critical	In Progress	1.0.0.0.0001	User Story	1.0	RQ:000039	Edit
System must allow the modification of users	No Tasks	1 - Critical	In Progress	1.0.0.0.0001	User Story	1.0	RQ:000040	Edit
System must allow the deletion of users	No Tasks	3 - Medium	Planned	1.0.0.0.0002	User Story	1.0	RQ:000041	Edit
Module 2	No Tasks	2 - High	Planned		Package	1.0	RQ:000042	Edit
System should allow administrators to setup notific...	No Tasks	2 - High	Planned	1.0.0.0.0002	User Story	1.0	RQ:000043	Edit

Show 15 rows per page

Displaying page 1 of 1

By default, all the requirements will have been assigned a default estimate of 1.0 points. The points are not a defined number of hours, but are instead an indication of the size of the requirement. The estimates should reflect how big each of the requirements are relative to each other.

Now, we can simply click the “select all” checkbox at the top of the list and then click on the top ‘Edit’ button in the right-hand column. The requirements will be displayed in editable mode again. Enter the following initial estimates for the requirements:

Requirement	Estimate
System must allow entry of users	1.5 points
System must allow the modification of users	2.0 points
System must allow the deletion of users	1.0 points
System should allow administrators to setup notifications	2.0 points

You should now have the requirements’ estimates displayed in the system:

External Projects > Sample Application Two > Search > Planning > Testing > Tracking > Reporting

System Administrator

Requirements | Releases | Iterations | Planning Board | Documents

Insert Delete Indent Outdent Show Level Refresh Edit Tools Show/Hide columns Filter

Displaying 7 out of 7 requirement(s) for this project.

Name	Test Coverage	Progress	Importance	Status	Release	Type	Estimate	ID	Edit
Functional Requirements	Not Covered	No Tasks		Requested		Package	6.5	RQ:000037	Edit
Module 1	Not Covered	No Tasks	1 - Critical	Requested		Package	4.5	RQ:000038	Edit
System must allow entry of users	Not Covered	No Tasks	1 - Critical	Requested		User Story	1.5	RQ:000039	Edit
System must allow the modification of users	Not Covered	No Tasks	1 - Critical	Requested		User Story	2.0	RQ:000040	Edit
System must allow the deletion of users	Not Covered	No Tasks	3 - Medium	Requested		User Story	1.0	RQ:000041	Edit
Module 2	Not Covered	No Tasks	2 - High	Requested		Package	2.0	RQ:000042	Edit
System should allow administrators to setup notific...	Not Covered	No Tasks	2 - High	Requested		User Story	2.0	RQ:000043	Edit

Show 15 rows per page

Displaying page 1 of 1

You can also view this same information in a graphic form by going to Planning > Planning Board to display the SpiraPlan agile planning board:

External Projects > Sample Application Two > Search > Planning > Tracking > Reporting

System Administrator

Requirements | Planning Board | Releases | Documents

Planning: Product Backlog Detailed View Incidents Tasks Test Cases

Group By: By Priority

(Unassigned Items)

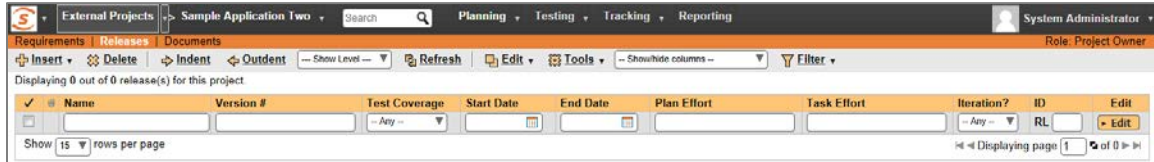
1 - Critical	RQ-39 System must allow entry of users 1.5	RQ-40 System must allow the modification of users 2.0
2 - High	RQ-43 System should allow administrators to setup notifications 2.0	
3 - Medium	RQ-41 System must allow the deletion of users 1.0	
4 - Low		

In the screenshot above, the planning board is displaying the product backlog by Priority/Importance. You can easily change the priority of requirements by dragging the items from one priority grouping to another. Also you can rearrange the items that have the same priority using drag and drop to specify a more exact prioritization.

Now that we have a list of prioritized, estimated requirements, the next task is to enter in our planned list of releases and iterations for the project.

3. Create the Release Plan

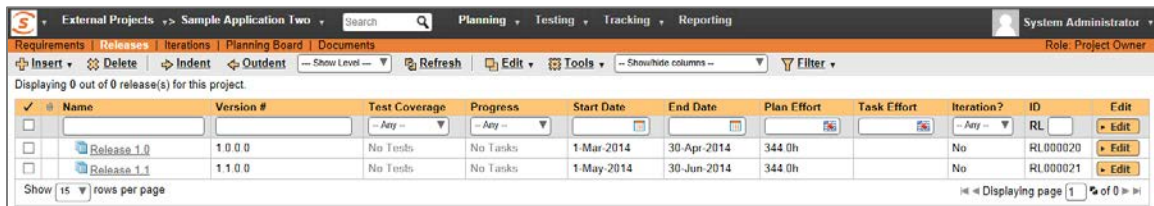
Click on the Planning > Releases menu option to display the project's release list page:



Initially the release list will be empty. Click on the “Insert” button in the main toolbar to enter the following releases in turn:

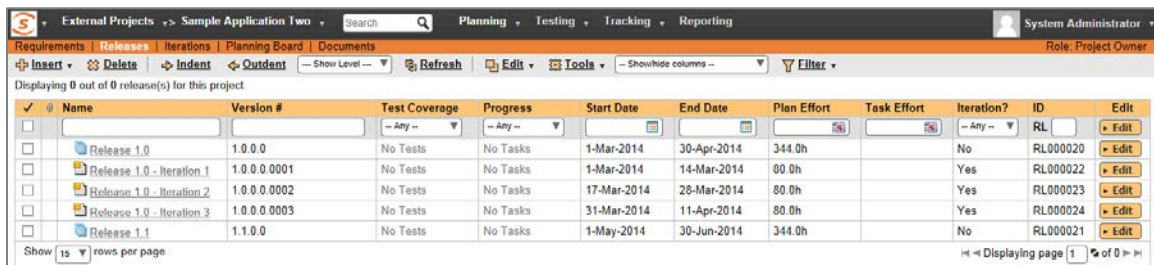
- Release 1.0 – version number 1.0.0.0
 - o Start Date: Today's Date
 - o End Date: Today's Date + 2 months
- Release 1.1 – version number 1.1.0.0
 - o Start Date: Today's Date + 2 months
 - o End Date: Today's Date + 4 months

You should now have a list of releases that looks like the following:



Now that we have the releases defined, we need to add one additional level of detail to each release – the list of *iterations* or *sprints* that will take place in each release. We shall enter in some sample iterations for the first release only.

Select the checkbox for the second release (Release 1.1) and choose the menu option Insert > New Iteration. A new iteration will be inserted between Release 1.0 and Release 1.1. Choose a name for the iteration, specify the date-range for the iteration, and click 'Update'. Now repeat this process twice and you should now have three iterations added to the list. We recommend making each iteration last 2-weeks and have each one scheduled in series:



Finally, to indent the three iterations under the parent release, select the checkboxes of the three iterations and click the 'Indent' button. You should now have a release hierarchy that looks like:

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Iteration?	ID	Edit
☒ Release 1.0	1.0.0.0	No Tests	No Tasks	1-Mar-2014	30-Apr-2014	344.0h		No	RL000020	Edit
☐ Release 1.0 - Iteration 1	1.0.0.0.0001	No Tests	No Tasks	1-Mar-2014	14-Mar-2014	80.0h		Yes	RL000022	Edit
☐ Release 1.0 - Iteration 2	1.0.0.0.0002	No Tests	No Tasks	17-Mar-2014	28-Mar-2014	80.0h		Yes	RL000023	Edit
☐ Release 1.0 - Iteration 3	1.0.0.0.0003	No Tests	No Tasks	31-Mar-2014	11-Apr-2014	80.0h		Yes	RL000024	Edit
☐ Release 1.1	1.1.0.0	No Tests	No Tasks	1-May-2014	30-Jun-2014	344.0h		No	RL000021	Edit

Finally we need to specify the number of resources that will be assigned to each iteration and release. To do that, click on the "Show/Hide Columns" dropdown list and Show the "# Resources" column. To make room you can hide the "Iteration?" column. Once the column is visible, select the checkboxes for "Release 1.0" and click the Bulk Edit button again. Now you should be able to adjust the # resources for the release and its iterations to 2. Then click Update:

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Iteration?	# Resources	ID	Edit
☒ Release 1.0	1.0.0.0	No Tests	No Tasks	1 Mar 2014	30 Apr 2014	688.0h		No	2	RL000020	Edit
☐ Release 1.0 - Iteration 1	1.0.0.0.0001	No Tests	No Tasks	1-Mar-2014	14-Mar-2014	160.0h		Yes	2	RL000022	Edit
☐ Release 1.0 - Iteration 2	1.0.0.0.0002	No Tests	No Tasks	17-Mar-2014	28-Mar-2014	160.0h		Yes	2	RL000023	Edit
☐ Release 1.0 - Iteration 3	1.0.0.0.0003	No Tests	No Tasks	31-Mar-2014	11-Apr-2014	160.0h		Yes	2	RL000024	Edit
☐ Release 1.1	1.1.0.0	No Tests	No Tasks	1-May-2014	30-Jun-2014	344.0h		No	1	RL000021	Edit

The screen now shows that the Plan Effort for each of the iterations has been doubled to 160 hours. This is the amount of time that you have available to allocate.

4. Adding Requirement Tasks

Now that we have defined the macro-schedule for Release 1.0, the next stage is to have the developers take each of the requirements defined so far and define the various tasks that will need to be carried out to develop the functionality outlined in the requirement. Each task will have its own estimate associated with it. In addition, you can optionally specify date-ranges and priorities to each of the individual tasks.

To start adding tasks, click on Planning > Requirements to display the requirements list. Now, click on the hyperlink for the first requirement ("System must allow entry of users") and the requirements details page will be displayed:

External Projects -> Sample Application Two -> Search -> Planning -> Testing -> Tracking -> Reporting

System Administrator -> Role: Project Owner

Requirements > Requirement Details | Releases | Iterations | Planning Board | Documents

Workflow Operations
 > Accept Requirement
 > Review Requirement

<< Back to Requirements List

Display: Current Filter

Functional Requirements
 Module 1
 System must allow entry of users
 System must allow the modification of users
 System must allow the deletion of users
 Module 2
 System should allow administrative users

Save Copy Refresh Delete Print Email Subscribe

Requirement: System must allow entry of users [RQ:000039]

Name: System must allow entry of users

Overview Test Coverage Tasks Attachments History Associations

Details
 Status: Requested
 Type: User Story
 Importance: 1 - Critical
 Owner: -- None --
 Creation Date: 2/19/2014 4:51:38 PM
 Author: System Administrator
 Release: -- None --
 Component: -- None --
 Estimate: 1.5 points (12.00 hours)
 Last Updated: 2/19/2014 5:28:45 PM

Description

Notice that the system displays an initial resource estimate of 12.00 hours for this requirement. This is simply based on an initial project setting of 8 hours per story point. Once you start adding tasks and getting metrics based on the actual team velocity (how many story points they can accomplish in a given time frame), the system can update that conversion metric.

Now click on the “Tasks” tab to display the list of tasks defined for this requirement:

Requirement: System must allow entry of users [RQ:000039]

Name: System must allow entry of users

Overview Test Coverage Tasks Attachments History Associations

> New Task | Remove | Refresh | Apply Filter | Clear Filter | -- Show/Hide columns -- > Est. Effort: - / Projected Effort: -

Displaying 1 - 0 out of 0 task(s). Filtering results by Requirement #. (Clear Filters)

✓	Name	Progress	Type	Status	Priority	Owner	Release	ID	Edit
☐		-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	TK	Edit

Show 15 rows per page

Displaying page 1 of 0

Initially the list of tasks will be empty. Before entering the tasks, first click on the “Show/Hide Columns” dropdown list and show the “Show Est. Effort” column. This will display the estimated effort for each Task.

Now, click on the “New Task” hyperlink to add a new task associated with this requirement:

Requirement: System must allow entry of users [RQ:000039]

Name: System must allow entry of users

Overview Test Coverage Tasks Attachments History Associations

> New Task | Remove | Refresh | Apply Filter | Clear Filter | -- Show/Hide columns -- > Est. Effort: 6.00 / Projected Effort: 6.00

Displaying 1 - 1 out of 1 task(s). Filtering results by Requirement #. (Clear Filters)

✓	Name	Progress	Type	Status	Priority	Owner	Release	Est. Effort	ID	Edit
☐		-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --		TK	Edit
☒	New Task		Development	Not Started	1 - Critical	-- None --	-- None --	6.00		Insert Update Cancel

Show 15 rows per page

Displaying page 1 of 1

Enter the name of the task “Create user data tables” and the estimated effort 10.0h and click Update. The new task should now have been added:

Requirement: System must allow entry of users [RQ:000039]

Name:

Overview Test Coverage **Tasks** Attachments History Associations

> New Task Remove Refresh Apply Filter Clear Filter -- Show/Hide columns -- > Est. Effort: 10.00 / Projected Effort: 10.00

Displaying 1 - 1 out of 1 task(s). Filtering results by Requirement #. (Clear Filters)

✓	Name ▲▼	Progress	Type ▲▼	Status ▲▼	Priority ▲▼	Owner ▲▼	Release ▲▼	Est. Effort ▲▼	ID ▲▼
☐	Create user data tables		Development	Not Started	1 - Critical			10.0h	TK-000044

Show 15 rows per page

Displaying page 1 of 1

Now we need to add the remaining tasks; the following table outlines all the tasks that need to be added under each of the requirements (we have included the one already created for completeness):

Requirement / Task	Est. Estimate
System must allow entry of users	
Create user data tables	10.0h
Develop user business object	10.0h
Build user creation screens	20.0h
System must allow the modification of users	
Extend user business object to handle updates	5.0h
Add user list page	15.0h
Add user details page	20.0h
Add user permissions page	15.0h
System must allow the deletion of users	
Extend user business object to handle deletes	5.0h
Update user list page to add delete functionality	10.0h
System should allow administrators to setup notifications	
Create user administration home page	15.0h
Add user settings for notifications to database	10.0h
Create user notifications administration page	20.0h

You should now have the following requirements list page:

External Projects -> Sample Application Two Search Planning Testing Tracking Reporting System Administrator

Requirements Releases Iterations Planning Board Documents Role: Project Owner

Insert Delete Indent Outdent -- Show Level -- Refresh Edit Tools -- Show/Hide columns -- Filter

Displaying 7 out of 7 requirement(s) for this project.

✓	Name ▲▼	Progress	Importance	Status	Release	Task Effort	Type	Estimate	ID	Edit
☐	Functional Requirements			In Progress		155.0h	Package	6.5	RQ-000037	Edit
☐	Module 1		1 - Critical	In Progress		110.0h	Package	4.5	RQ-000038	Edit
☐	System must allow entry of users		1 - Critical	In Progress		40.0h	User Story	1.5	RQ-000039	Edit
☐	System must allow the modification of users		1 - Critical	Planned		55.0h	User Story	2.0	RQ-000040	Edit
☐	System must allow the deletion of users		3 - Medium	Planned		15.0h	User Story	1.0	RQ-000041	Edit
☐	Module 2		2 - High	Planned		45.0h	Package	2.0	RQ-000042	Edit
☐	System should allow administrators to setup notifi...		2 - High	Planned		45.0h	User Story	2.0	RQ-000043	Edit

Show 15 rows per page

Displaying page 1 of 1

Where we've hidden the "Author" field and shown the "Task Effort" field to illustrate that the detailed task estimates may be different from the original estimates for the requirements.

Now when we add new requirements, it would be nice if the system would use this updated information when determining the estimated number of hours to deliver requirements with a specified number of story points. To update the metric the system uses, go to Administration > Planning Options:

Planning Options | Sample Application Two (Change Project)

The following schedule and calendar options are currently being used by this project. To change the settings, just modify the values and then click [Update] to commit the changes.

Once you are happy with the changes, it is recommended you refresh the schedule and progress information in the project through the [Data Caching](#) administration screen.

General

Work Hours Per Day:* 8 hours

Work Days Per Week:* 5 days

Non-Working Hours Per Month:* 0 hours

Effort Calculations:*
☒ Include Task Effort
☒ Include Incident Effort
☐ Include Test Case Effort

Requirements

Default Estimate: 1.0 points

Point Effort:* 8.0 hours **Suggest**

This is the conversion factor used to determine the number of person-hours per estimated point.

As you can see, the system lists 8.0 hours as the current number of hours required to deliver a single story point of functionality. Now that we have some actual tasks in the project, click on the “Suggest” button to have the system provide its suggestion of the new metric:

Suggest Point Effort

The following point effort is recommended based on the current projected task effort values in the current project:

Default Effort: 23.8 hours

Apply **Cancel**

Click the ‘Apply’ button to update the planning metric, and then click the main ‘Update’ button to confirm the change.

5. Planning the Iteration

Now that the developers have elaborated each of the requirements to include the necessary tasks, the next step is to scope out the plan for each iteration / sprint. Click on the Planning > Planning Board option on the main menu to display the product backlog planning board:

Requirements | Planning Board | Releases | Documents

Planning: Product Backlog Detailed View ☐ Incidents ☒ Tasks ☐ Test Cases Group By: By Priority

(Unassigned Items)

1 - Critical

RQ-39 System must allow entry of users 1.5 RQ-40 System must allow the modification of users 2.0

2 - High

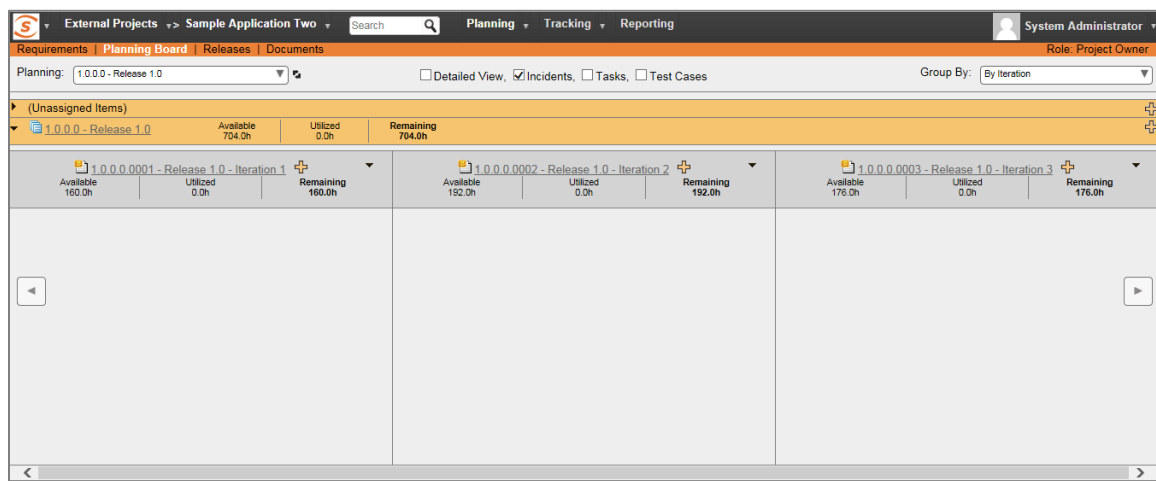
RQ-43 System should allow administrators to setup notifications 2.0

3 - Medium

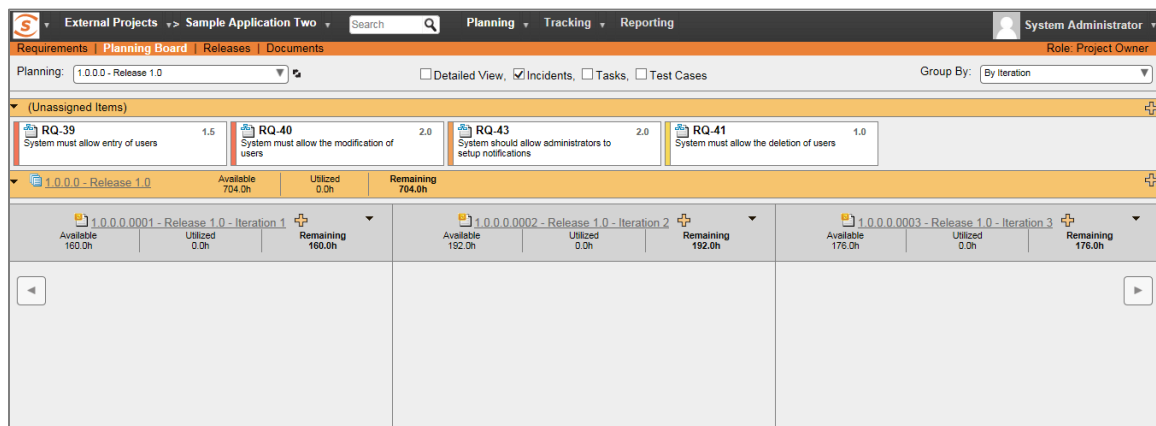
RQ-41 System must allow the deletion of users 1.0

4 - Low

Now to view the iteration plan for a specific release, select ‘Release 1.0’ from the drop-down menu at the top-left of the screen. That will display the iteration plan for the selected release:

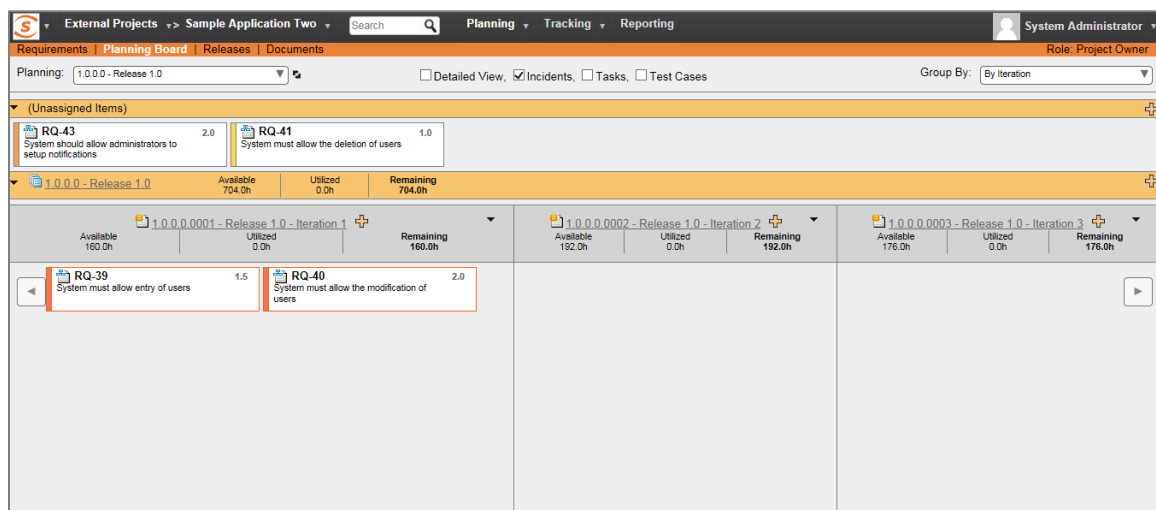


Expand the '(Unassigned Items)' entry to display the requirements that are in the product backlog:

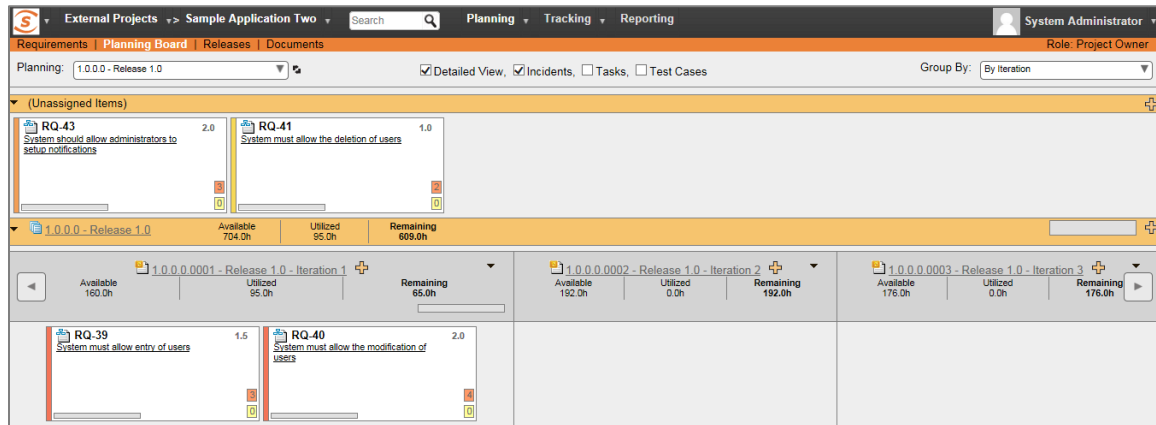


Each backlog item (requirement or incident) is represented by a virtual “story card” in the iteration. The left-hand side of each item displays the priority color and the progress bar at the bottom of each item depicts the progress of the item. You can flip through each iteration to see the work planned by clicking the left/right arrow buttons at the sides of the screen.

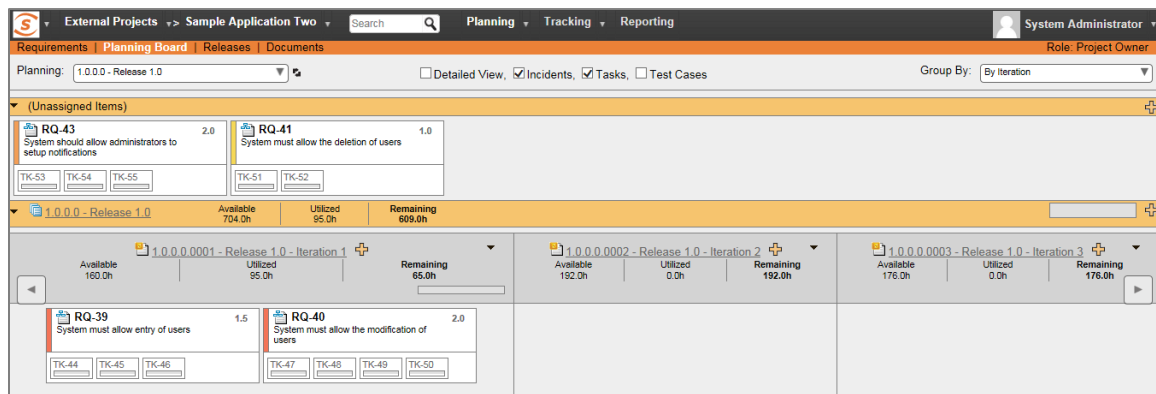
Now drag the two highest priority requirements (the ones with Importance = 1-Critical) to the first iteration:



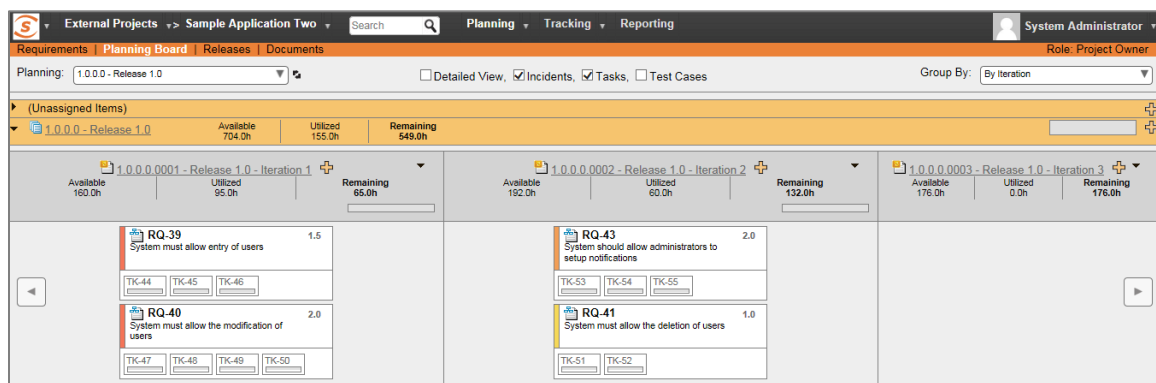
If you would like to see more information about each requirement, simply enable the 'Detailed View' option:



To see the individual tasks associated with each requirement, you can also select the 'Tasks' option:



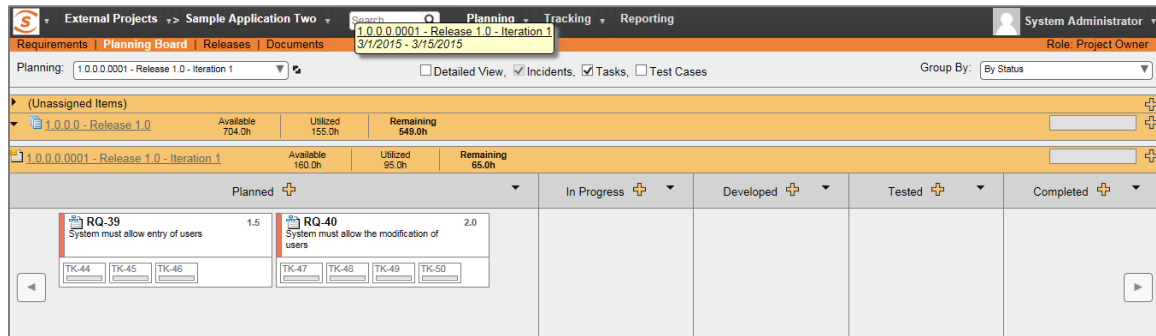
You can now determine how much time has been scheduled in the first iteration and how much time is remaining. Although we do have spare time available in Iteration 1 we will leave room left for fixing incidents, so next, drag and drop the remaining two requirements to the second iteration:



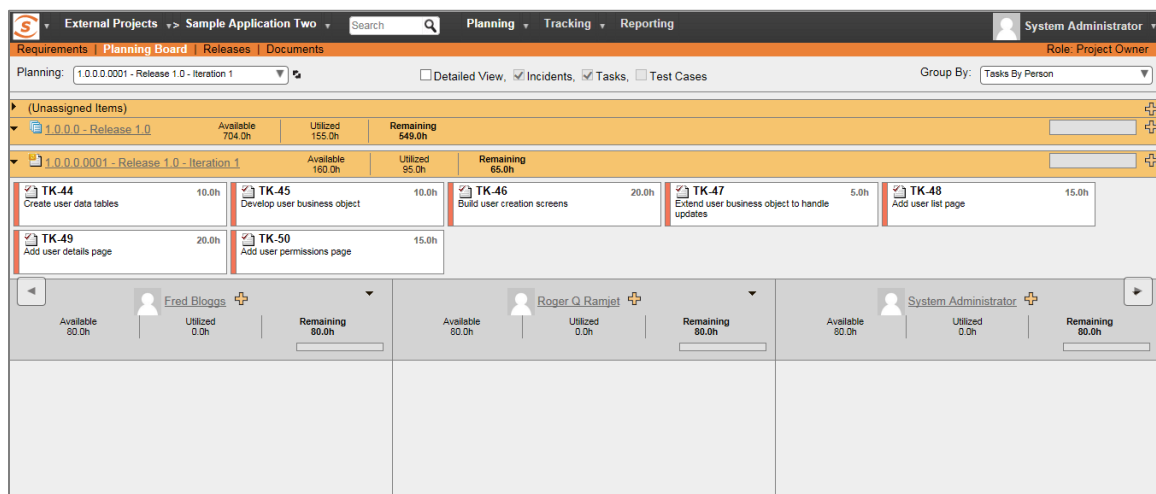
6. Assigning the Requirements & Tasks

Now that we have planned which requirements (user stories) and tasks are planned for each iteration, we can assign the individual tasks to the appropriate developer(s). The process you follow will depend on your methodology (e.g. in Scrum the developers simply pick the tasks, whereas in Extreme Programming the project manager will usually do the assignment).

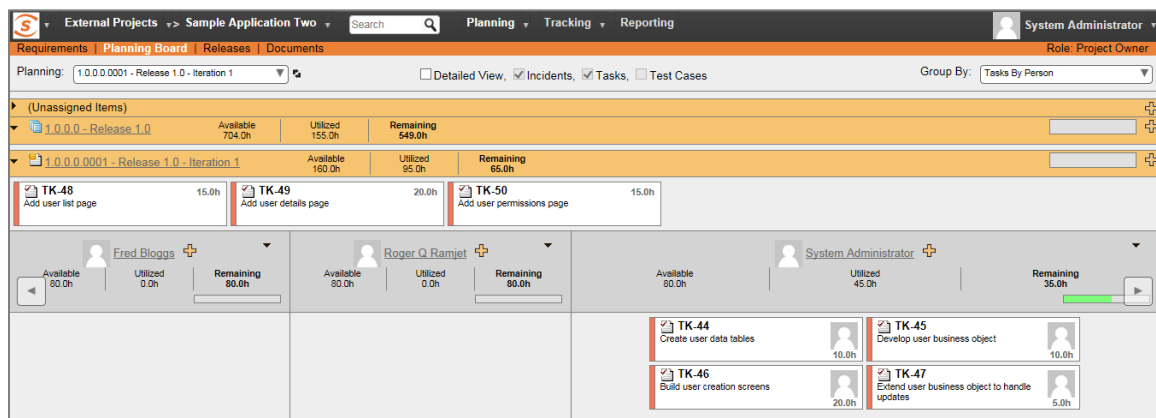
Within the same Planning > Planning Board screen used in the section above, click on the 'Release 1.0 - Iteration 1' hyperlink. This will switch the planning board to the iteration view for iteration 1:



To view the tasks by person, change the right-hand dropdown from "Group By: Status" to "Group By: Tasks by Person":



For our sample project we have three project members listed (included ourself). As an example, select the first four tasks (which are all priority = 1 – Critical) and drag them to your user's section:



Now you can clearly see the four tasks that have been assigned to your user. To simulate how this would appear to a developer, click on the main SpiraPlan icon (in the top-left) to display your user's "My Page" dashboard:

External Projects -> Sample Application Two Search Planning Tracking Reporting System Administrator Role: Project Owner

My Page > System Administrator | My Timecard | Administration

Welcome System Administrator to Your Dashboard (Modify Layout/Settings | Add Items)

Display data for: ☒ All Projects ☐ Current Project

My Projects

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Three	External Projects	7-Oct-2014
Sample Application Two	External Projects	30-Nov-2005
Test Project	Default Group	2-Oct-2014

My Saved Searches

Name	Project
------	---------

My Assigned Requirements

Name	Project	Importance	Status
------	---------	------------	--------

Quick Launch

> Create Incident in: Sample Application Two

My Contacts

Name	Department	Online	Operations
------	------------	--------	------------

My Assigned Incidents

Name	Project	Type	Priority	Date Opened
------	---------	------	----------	-------------

My Detected Incidents

Name	Project	Type	Priority	Date Opened
------	---------	------	----------	-------------

My Assigned Tasks

Name	Project	Progress	Priority	Due Date
☒ Create user data tables	Sample Application T...		1 - Critical	15-Mar-2015
☒ Develop user business object	Sample Application T...		1 - Critical	15-Mar-2015
☒ Build user creation screens	Sample Application T...		1 - Critical	15-Mar-2015
☒ Extend user business object to ...	Sample Application T...		1 - Critical	15-Mar-2015

This page lists all the development tasks that have been assigned to your user. Click on the first task "Create user data tables" to display the task details page:

Task: ☒ Create user data tables [TK:000044]

Name:

Overview Attachments History # Associations

Details

Status: Priority:

Type: Owner:

Requirement: (Change)

Release / Iteration: (3/1/2014 - 3/14/2014) Last Updated: 2/20/2014 2:42:33 PM

Creator: (2/20/2014 10:08:10 AM)

Description

Comments

Schedule

Start Date: End Date:

Progress: (%) Est. Effort: hours

Projected Effort: 10.00 hours

This task has been estimated at 10.0 hours and is currently not started. The next step is to start working on the assigned task and report back progress. As an example, click the workflow operation "Start Task", then enter an actual effort of 3.0 hours, a remaining effort of 5.0 hours and add a comment "Added initial set of data tables". Upon clicking 'Save', the progress indicator will reflect the changes and the new comment will have been added to the list:

External Projects >> Sample Application Two										
Planning > Testing > Tracking > Reporting										
System Administrator										
Requirements Releases Iterations Planning Board Documents										
Insert Delete Indent Outdent Show Level Refresh Edit Tools Showhide columns Filter										
Displaying 7 out of 7 requirement(s) for this project										
✓ Name	Progress	Importance	Status	Release	Est. Effort	Task Effort	Type	Estimate	ID	Edit
Functional Requirements			In Progress		154.7h	155.0h	Package	6.5	RQ-000037	Edit
Module 1			In Progress		107.1h	110.0h	Package	4.5	RQ-000038	Edit
System must allow entry of users		1 - Critical	In Progress	1.0.0.0.0001	35.7h	40.0h	User Story	1.5	RQ-000039	Edit
System must allow the modification of users		1 - Critical	In Progress	1.0.0.0.0001	47.6h	55.0h	User Story	2.0	RQ-000040	Edit
System must allow the deletion of users		3 - Medium	Planned	1.0.0.0.0002	23.8h	15.0h	User Story	1.0	RQ-000041	Edit
Module 2			Planned		47.6h	45.0h	Package	2.0	RQ-000042	Edit
System should allow administrators to setup notifi...		2 - High	Planned	1.0.0.0.0002	47.6h	45.0h	User Story	2.0	RQ-000043	Edit

7. Logging Issues and Defects

During the development of the various features, the developers may run into unexpected issues/defects with other parts of the system. To record these incidents and have them reflected in the plan, we shall pretend that a bug was found during the development of the user entry screen. Click on the Tracking > Incidents page to display the list of incidents and then click on the “New Incident” icon:

Save Save and Close Save and New

Incident Name: New Incident

Name: *

Overview Attachments

Details

Status: * > New

Detected By: * System Administrator

Type: * Incident

Detected Release: * -- None --

Priority: -- None --

Severity: -- None --

Creation Date: 4/16/2013 10:22:14 PM

Last Updated: 4/16/2013 10:22:14 PM

Description

Schedule

Start Date:

Closed On:

Progress: * (0%)

Est. Effort: hours

Projected Effort: - hours

Actual Effort: hours

Remaining Effort: hours

Enter in the following information for this new incident and click “Save”:

- **Name:** Error when logging in to application to add users
- **Type:** Bug
- **Description:** When logging in to the application to build the new users administration section, I received a 500 system error.
- **Detected Release:** 1.0.0.0.0000 - Release 1.0 - Iteration 1
- **Priority:** 2 - High

Once the incident has been saved, click on the “Associations” tab to add a link from the new incident to the requirement that it’s related to:

Incident Name: Error when logging in to application to add users [IN:000086]

Name: Error when logging in to application to add users

Overview Attachments History Associations

> Add Delete Refresh Apply Filter Clear Filter Include Source Code Revisions

Displaying 1 - 0 out of 0 association(s).

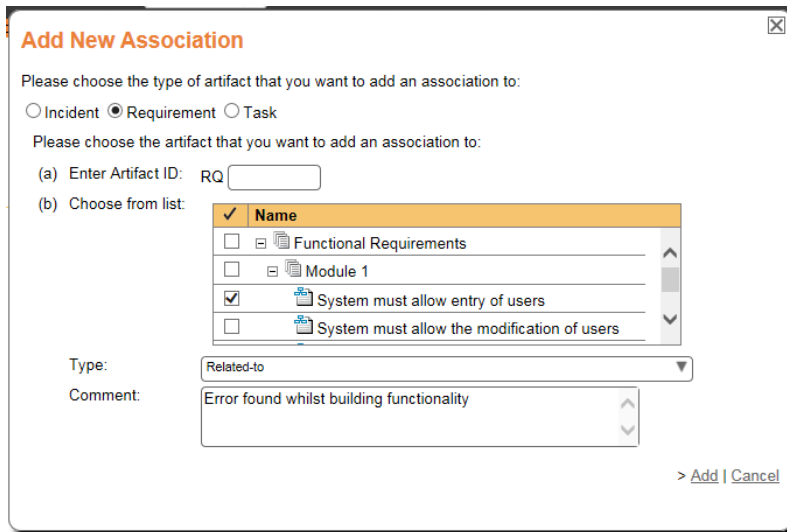
✓	Artifact Name	Artifact Type	Creation Date	Creator	Comment	ID	Edit
		-- Any --		-- Any --			Edit

Show 15 rows per page

Displaying page 1 of 0

> Create a new requirement from this incident

Click on the “Add” hyperlink and choose the Requirement radio button and then select the “System must allow entry of users” requirement from the hierarchy:



Add New Association

Please choose the type of artifact that you want to add an association to:

☐ Incident ☒ Requirement ☐ Task

Please choose the artifact that you want to add an association to:

(a) Enter Artifact ID: RQ

(b) Choose from list:

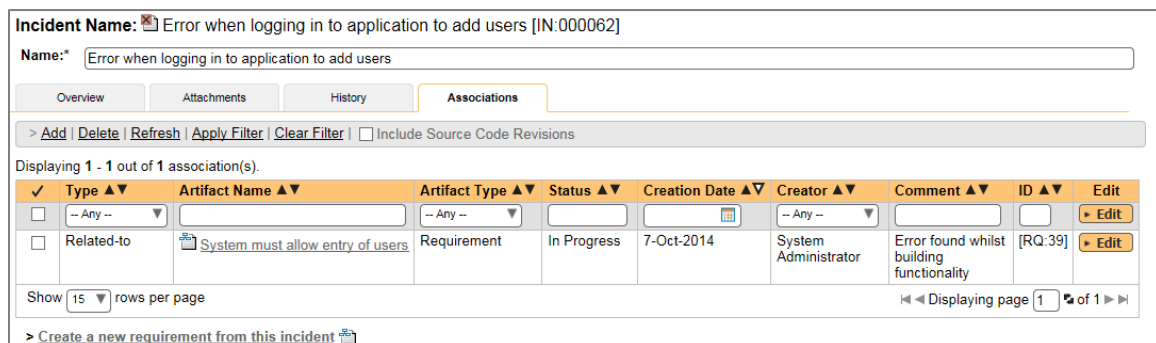
✓	Name
☐	Functional Requirements
☐	Module 1
☒	System must allow entry of users
☐	System must allow the modification of users

Type:

Comment:

> [Add](#) [Cancel](#)

Leave the Type as ‘Related-to’, enter a comment and click the “Add” button to add the association:



Incident Name: Error when logging in to application to add users [IN:000062]

Name:

Overview | Attachments | History | **Associations**

> [Add](#) | [Delete](#) | [Refresh](#) | [Apply Filter](#) | [Clear Filter](#) | ☐ Include Source Code Revisions

Displaying 1 - 1 out of 1 association(s).

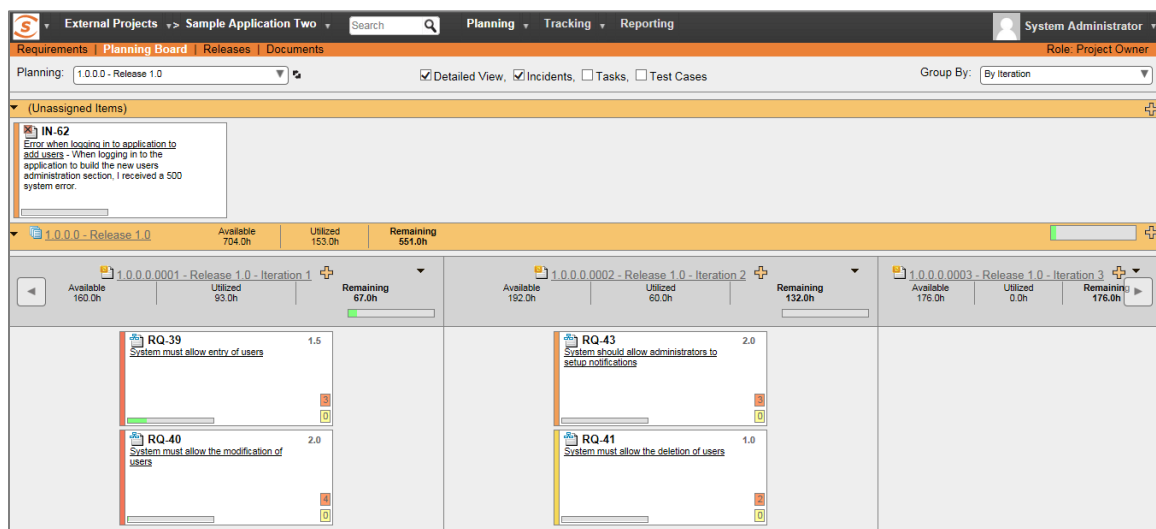
✓	Type ▲▼	Artifact Name ▲▼	Artifact Type ▲▼	Status ▲▼	Creation Date ▲▼	Creator ▲▼	Comment ▲▼	ID ▲▼	Edit
☐	Related-to	System must allow entry of users	Requirement	In Progress	7-Oct-2014	System Administrator	Error found whilst building functionality	[RQ:39]	Edit

Show rows per page

Displaying page 1 of 1

> [Create a new requirement from this incident](#)

Now that a new incident has been logged, the project manager will review the incident and assign it to one of the iterations to be fixed in. To do this, click on Planning > Planning Board and change the view to ‘Release 1.0’ grouped ‘By Iteration’ (make sure ‘Incidents are included’):



External Projects > Sample Application Two

Planning | Tracking | Reporting

System Administrator

Requirements | **Planning Board** | Releases | Documents

Planning: 1.0.0.0 - Release 1.0

☒ Detailed View, ☒ Incidents, ☐ Tasks, ☐ Test Cases

Group By: By Iteration

(Unassigned Items)

IN-62 Error when logging in to application to add users - When logging in to the application to build the new users administration section, I received a 500 system error.

1.0.0.0 - Release 1.0

Available	Utilized	Remaining
754.0h	153.0h	551.0h

Available	Utilized	Remaining
160.0h	93.0h	67.0h
192.0h	60.0h	132.0h
176.0h	0.0h	176.0h

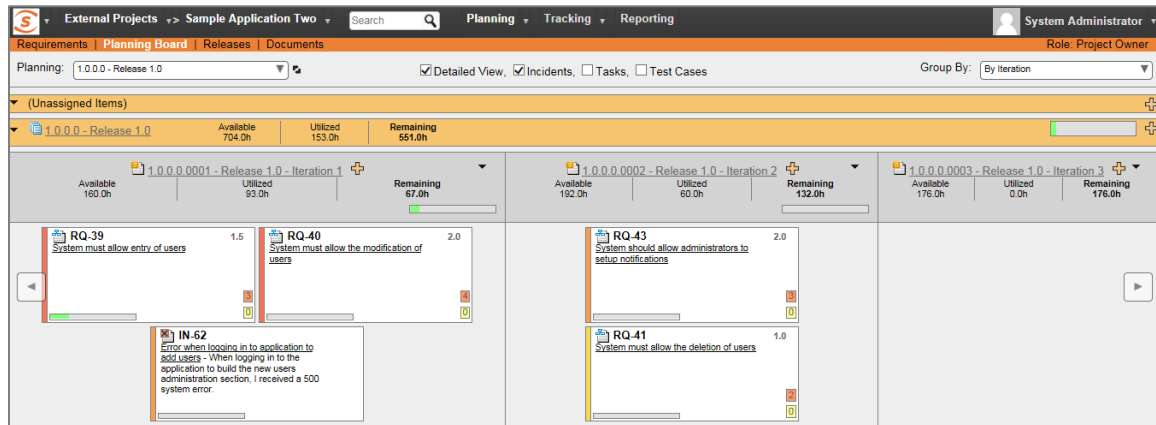
RQ-39 System must allow entry of users 1.5

RQ-40 System must allow the modification of users 2.0

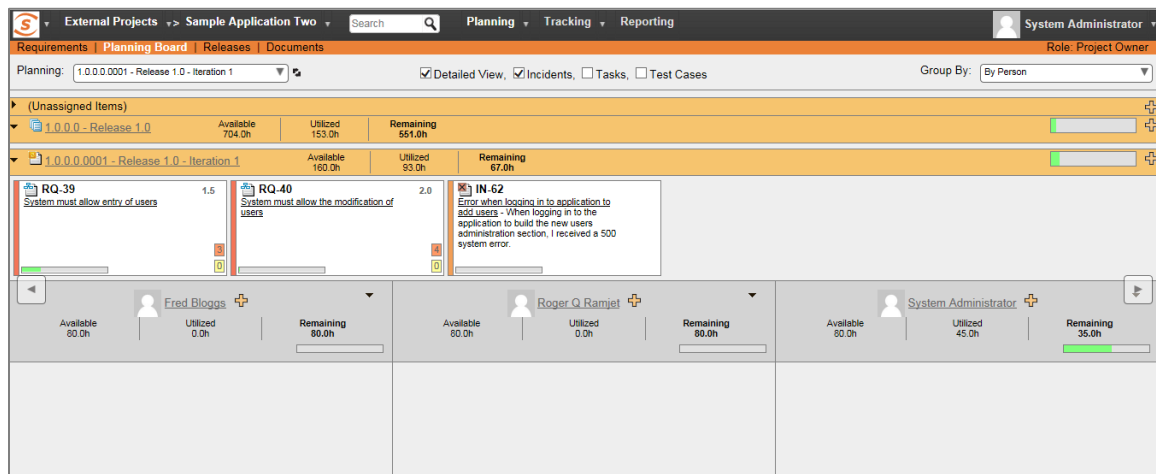
RQ-43 System should allow administrators to setup notifications 2.0

RQ-41 System must allow the deletion of users 1.0

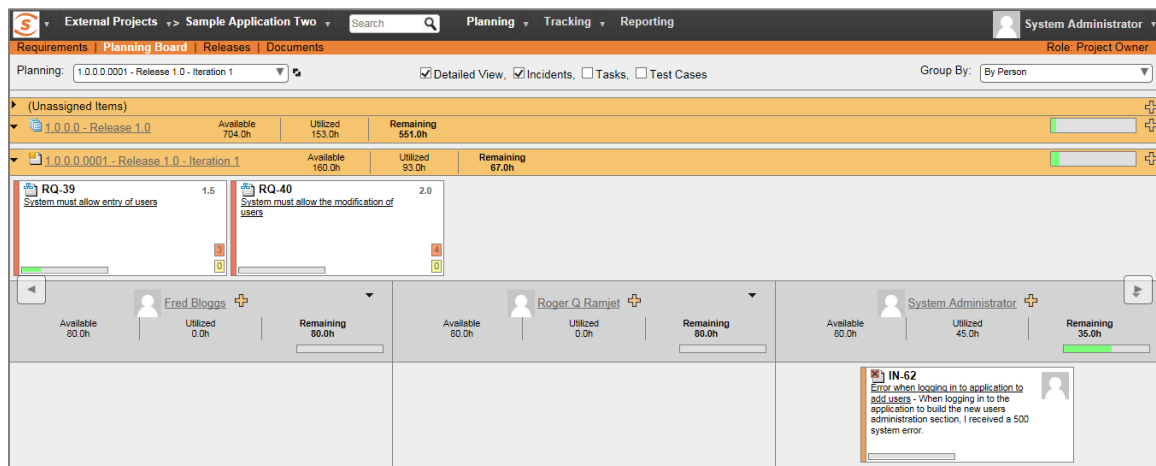
Now drag the new incident from the “(Unassigned Items)” section to the first iteration. This will add the new incident to the plan for this iteration / sprint:



To assign the incident to a developer, simply click on the Iteration hyperlink and change the view to ‘By Person’:



Then drag the incident from the Iteration1 backlog (above the person names) to the developer (in this case our user) who will be fixing the incident:



To simulate this process, go back to the “My Page” by clicking on the orange Spira icon in the top-left of the screen:

External Projects > Sample Application Two > Search Planning Tracking Reporting System Administrator

My Page > System Administrator | My Timecard | Administration Role: Project Owner

Welcome System Administrator to Your Dashboard (Modify Layout/Settings | Add Items)

Display data for: All Projects Current Project

My Projects

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Two	External Projects	2 Apr 2013

My Saved Searches

Name	Project
------	---------

My Assigned Requirements

Name	Project	Importance	Status
------	---------	------------	--------

Quick Launch

> Create Incident in: Sample Application Two

My Assigned Incidents

Name	Project	Type	Priority	Date Opened
Error when logging in to application to ...	Sample Application T...	Bug	2 - High	16-Apr-2013

My Detected Incidents

Name	Project	Type	Priority	Date Opened
Error when logging in to application to ...	Sample Application T...	Bug	2 - High	16-Apr-2013

My Assigned Tasks

Name	Project	Progress	Priority	Due Date
Create user data tables	Sample Application T...		1 - Critical	12-Apr-2013
Develop user business object	Sample Application T...		1 - Critical	12-Apr-2013
Build user creation screens	Sample Application T...		1 - Critical	12-Apr-2013
Extend user business object to...	Sample Application T...		1 - Critical	12-Apr-2013

You can now see that you've been assigned an incident under the "My Assigned Incidents". Now click on the hyperlink for the incident to bring up the incident details page:

Incident Name: Error when logging in to application to add users [IN:000086]

Successfully Saved Changes to Incident

Name: Error when logging in to application to add users

Overview Attachments History # Associations #

Details

Status: > Assigned

Type: Bug

Priority: 2 - High

Severity: -- None --

Owner: System Administrator

Creation Date: 4/16/2013 10:45:31 PM

Detected By: System Administrator

Detected Release: 1.0.0.0.0000 - Release 1.0 - Iteration 1

Resolved Release: 1.0.0.0.0000 - Release 1.0 - Iteration 1

Verified Release: -- None --

Fixed Build: -- None --

Last Updated: 4/16/2013 11:13:46 PM

Description

When logging in to the application to build the new users administration section, I received a 500 system error

Comments

Displaying list of comments: (newest first | oldest first)

To add a new comment, enter it below and click the [Save] button:

Schedule

Start Date: 4/1/2013

Progress: (0%)

Projected Effort: 5.00 hours

Closed On:

Est. Effort: 5.00 hours

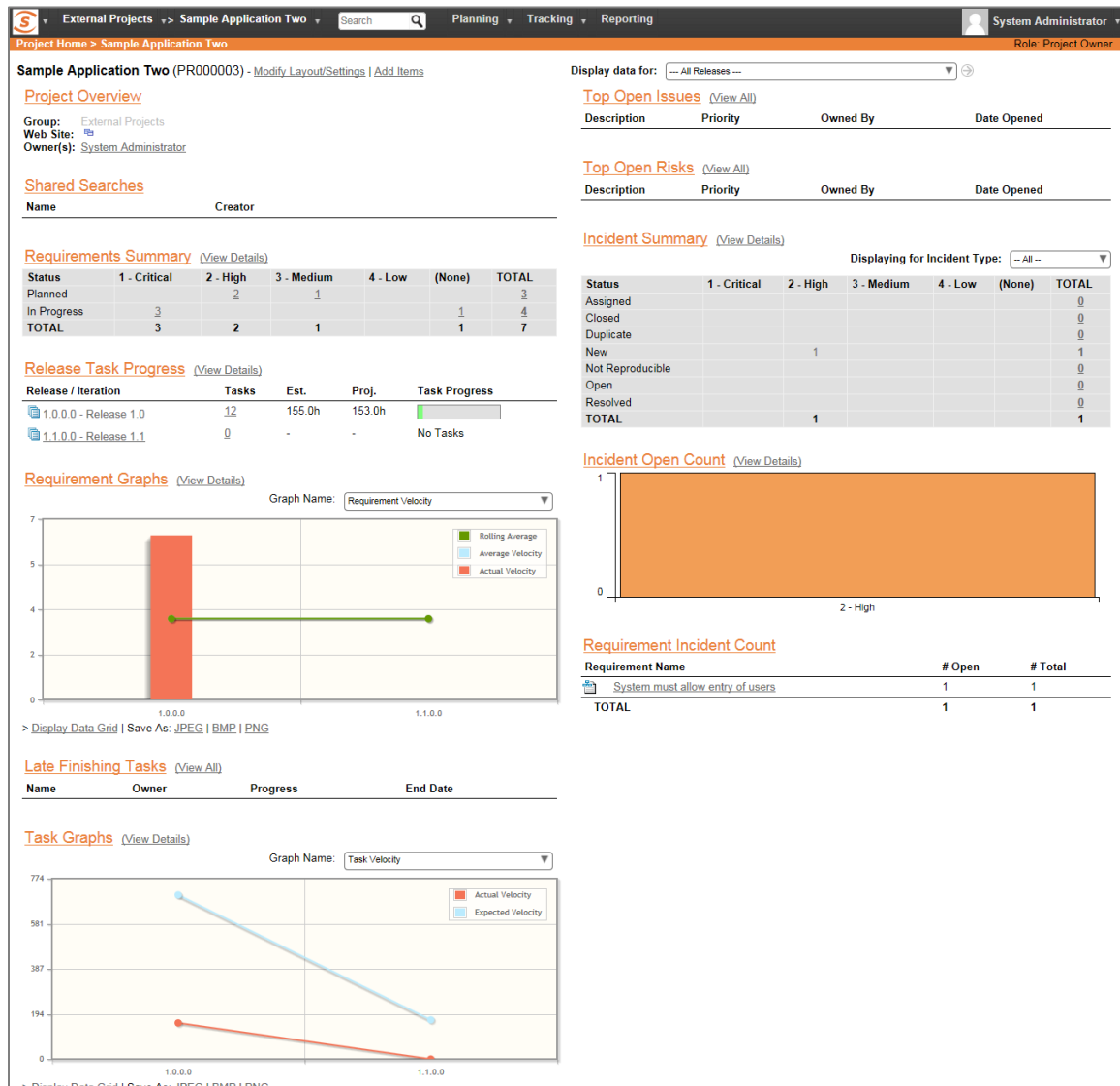
Actual Effort:

Remaining Effort:

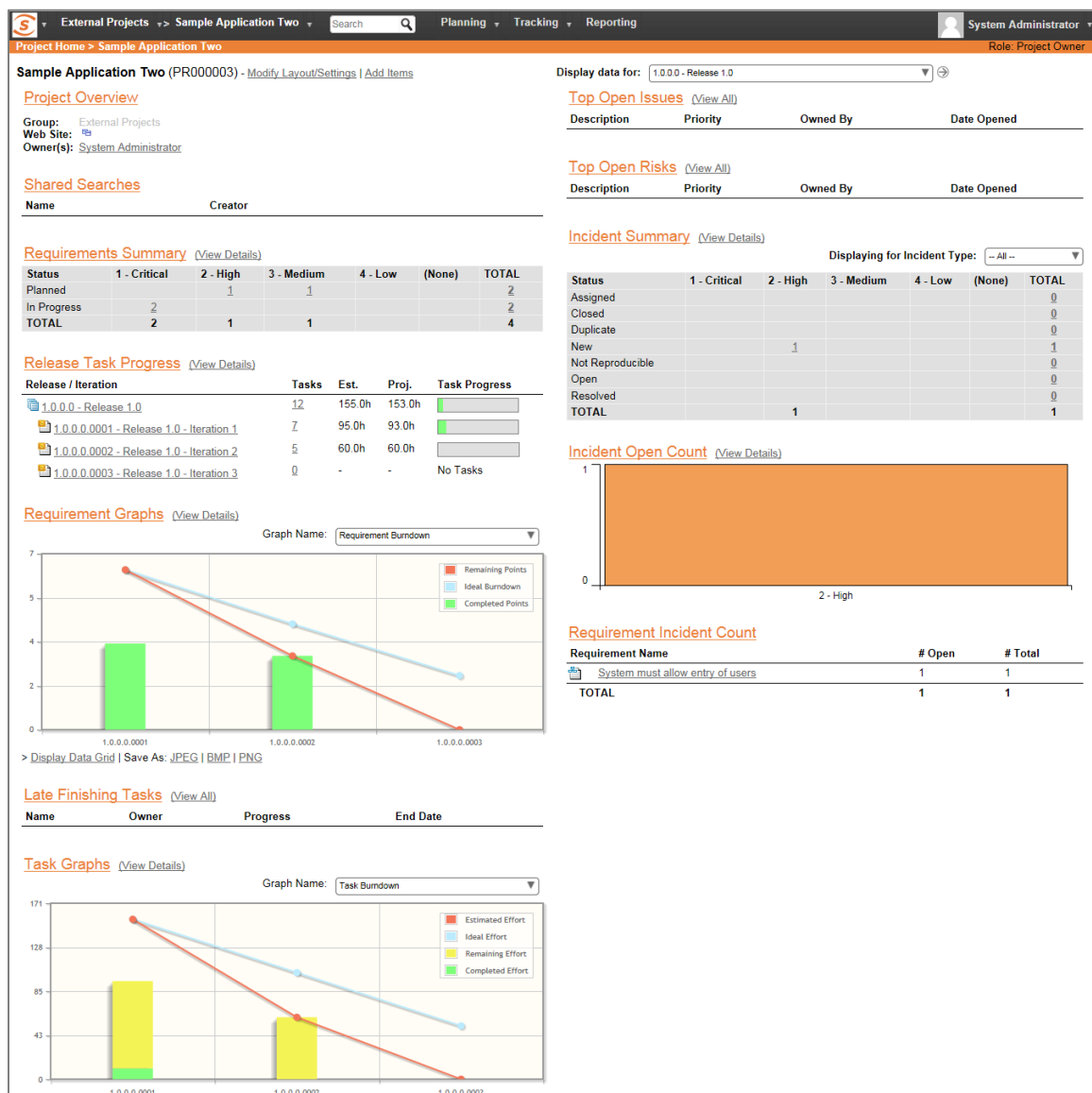
The developer would now resolve the incident, add a comment describing the solution and change the status to Resolved.

8. Reporting

Now that we have created our requirements, added tasks, reporting progress and logged incidents, if we go to the project homepage for this project, we'll now see the various widgets populated with key metrics:



Some of the graphs (e.g. burndown and burnup) make more sense when you have a Release or Iteration selected in the dropdown list on the top-right of the page. Once you do that you'll get the Release or Iteration dashboard:



Congratulations, you have now completed the planning and tracking lifecycle using SpiraPlan. For more information about any of the features, please refer to the *SpiraPlan User Manual*.

Legal Notices

This publication is provided as is without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of merchantability, fitness for a particular purpose, or non-infringement.

This publication could include technical inaccuracies or typographical errors. Changes are periodically added to the information contained herein; these changes will be incorporated in new editions of the publication. Inflectra® Corporation may make improvements and/or changes in the product(s) and/or program(s) and/or service(s) described in this publication at any time.

The sections in this guide that discuss internet web security are provided as suggestions and guidelines. Internet security is constantly evolving field, and our suggestions are no substitute for an up-to-date understanding of the vulnerabilities inherent in deploying internet or web applications, and Inflectra® cannot be held liable for any losses due to breaches of security, compromise of data or other cyber-attacks that may result from following our recommendations.

The section of the manual that describes modifying the Windows System Registry ("Registry") should only be attempted by experienced Windows administrators who are familiar with its organization and contents. Inflectra® cannot be held liable for any losses due to damage to the system registry made by inexperienced personnel.

SpiraTest®, SpiraPlan®, SpiraTeam® and Inflectra® are registered trademarks of Inflectra Corporation in the United States of America and other countries. Microsoft®, Windows®, Explorer® and Microsoft Project® are registered trademarks of Microsoft Corporation. All other trademarks and product names are property of their respective holders.

Please send comments and questions to:

Technical Publications

Inflectra Corporation

8121 Georgia Ave

Suite 504

Silver Spring, MD 20910

U.S.A.

support@inflectra.com